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PeopleSoft Enterprise Release Notes for SCM Supplier Relationship Management 8.9 Bundle 6

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Open Source Disclosure

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These release notes reflect application updates for PeopleSoft Enterprise Supplier Relationship Management (SRM) products since the SCM 8.9 Bundle 5. This document includes resolutions for the following Supplier Relationship Management applications:

- PeopleSoft Enterprise eProcurement.
- PeopleSoft Enterprise Purchasing.
- PeopleSoft Enterprise Services Procurement.
- PeopleSoft Enterprise Strategic Sourcing.

PeopleSoft Enterprise eProcurement

This table summarizes application updates for PeopleSoft Enterprise eProcurement since the SCM 8.9 Bundle 5.

Functional Categories	Description
Catalog Search	• Corrected ePro catalog sorting to prevent an error from occurring when sorting searched catalog items after coming back from the Item Detail page. • Modified the Catalog Tree Search to work correctly.
ChartFields	• Modified the requisition process to not save a requisition with a budgetary ChartField. • Ensured consistency on ChartField positioning among ePro requisition pages.
DirectConnect/Intgrtion Broker	• Ensured the add and delete options are not available for punchout items on the Shipping page after coming back from the vendor site. • Enhanced PO dispatching by setting the cXML PO order date according to cXML standard when generating the xml output. • Ensured the MarketSite status on the dispatched PO message log record is updated correctly based on the response sent back from the MarketSite.
Dispatch	Corrected problem by preventing an invalid one-time ship to addresses from being created when adding a new eProcurement requisition.
Performance	Improved saving a requisition performance after adding more items into existing requisition with a large number of line items.
Platform Specific	Ensured that orphaned items and categories are available from the ePro search process when the type is VSE or TSE and the catalog security is not selected by requestor.

Requisition Creation	• Modified process to prevent new line comments from being overridden by old line comments in an eProcurement requisition when the existing line item is deleted in update display mode. • Ensured that requisition document will correctly display the decimals places in the merchandise amount when in view printable mode. • Ensured that when creating a special request requisition, the requisition header comments are not being deleted or appended to the end of the line comments when the comments are added in the sequence of line comments, header comments, and then line comments.
Requisition Cycle/Lifeline	Modified the Requisition Cycle page to allow the hyperlinks to work properly under the HTTPS configuration.
Requisition Manager	Updated the Manage Requisition page to only display requisitions created by eProcurement modules or Requisition Loader.
Requisition Sourcing	• Modified the Expedite Requisition and Casual Receive pages to allow the edit box and prompt to be used for searching and selecting the unit of measure (UOM). • Updated the Expedite Requisition page so that the status of the PO created is assigned according to the setup of "Build POs as Approved" flag.
Requisitions	Corrected budget checking of requisitions to work properly after changing the quantity on a zero price item.
Search Criteria	Improved searches on the Manage Requisitions page where requisitions sourced into multiple POs can be retrieved using any of the sourced PO ids.
Usability	• Ensured that the buyer is correctly defaulted on the Manage Purchase Orders page. • Ensured the vendor field displays properly on the Analyze Procurement Data page.
Verity Search	Ensured the manufacturer information is retrieved when searching items using Verity.
Workflow	• Corrected the problem with a PeopleCode error being generated when approving a requisition for the approval process when it was set up with the “Take Action On Line Completion” unchecked. • Modified the ePro workflow approval functionality to prevent the approval from being reinitialized if the comments are changed when editing the requisition.

PeopleSoft Enterprise Purchasing

This table summarizes application updates for PeopleSoft Enterprise Purchasing since the SCM 8.9 Bundle 5.

Functional Categories	Descriptions
PO Change Orders	• Resolved issue with change order tracking. If the change order tracking is enabled or disabled for ship-to, price, or due date; the change order message will be changed to issued or not issued. • Ensured that the contract maximum amount does not exceed the PO distribution amount when a change order is created using the eProcurement change request.
ChartFields	Modified the requisition process to not save a requisition with a budgetary ChartField.
Entry Event	Changed the budget checking and canceling of a requisition to retain canceled history records on the Commitment Control tables. This will allow the Requisition Entry Event to properly create entry event reversal entries.
Integration	• Modified the Purchasing to Inventory requisition sourcing using the Build Inventory Demand process to allow the line back order rule, line reservation back order, line reservation rule, and the order reservation rule to default on to the material stock request. • Modified to not use the message status field to determine if a message is active for PeopleTools 8.48.
RTV	• Resolved issue to allow the RTV fee to change in accordance with the RTV quantity. • Updated online RTV to reopen closed POs in dispatched status only.
Receiving	Updated to prevent an erroneous message from displaying when changing the stocking unit of measure on the receiving page.
PO Batch	• Ensured that the currency conversion rate is properly updated when using PO Auto Source. • Ensured that the vendor contact details are not populated during the PO Calculation process. • Updated the PO Calculations process to pick up the expense rate for Service Procurement.
Contract	• Corrected the problem with generating purchase orders for multiple business unit releases within a contract. • Resolved issue with the recurring voucher contract when using the speedchart to create voucher distribution lines where the CURRENCY_CD and RT_TYPE are not blank on the Contract Distribution table for the first distribution line that is created by the speedchart. • Ensured that receiving required and inspection required are defaulting

	properly when a contract is used. • Ensured the currency control field restriction is removed in order for the price adjustments to update correctly on the contracts. • Modified the entry status on a contract to update correctly when a PO is cancelled. • Ensured that for the contract release lines and the sum of the voucher gross amount does not exceed the contract maximum amount.
Item /Miscellaneous Charges	• Changed the standard price on the Purchasing Attributes page to be updated using the correct rate type when the vendor information is modified. • Modified to allow the Item Miscellaneous Charges to be inactivated. • Modified so that a search will display the correct category by prevented the category from being overwritten once it is chosen. • Modified the Miscellaneous Charge Setup page to prevent the user from entering invalid options. • Ensured the calculated freight miscellaneous charge amount is properly updated when the currency code is changed on the PO header. • Corrected the schedule miscellaneous charge currency code to update properly while saving a PO.
PO Online	• Corrected problem causing fatal error when a direct ship is sourced to a PO and the PO is dispatched and one of the direct ship schedules on a multiple scheduled PO line that was canceled. • Resolved issue with PO Unavailable Date Edit Check by allowing triggering only when the item is changed on the PO lines. • Ensured that the transport and freight charges are calculated properly in the purchase order. • Ensured that retrofitting the values entered on the PO Defaults page will update to all the lines in the PO when chunking is enabled. • Modified to correct error opening the PO page. • Modified to not allow a user to create change orders if the requisition is distributed by amount and it is sourced to a PO. • Updated online Purchase Order Copy functionality to display correct one time address icon. • Modified to allow a PO distribution split with negative amount. • Corrected to prevent error from occurring when saving a PO using a speedchart with distribution by amount. • Added prompt to check the accounting period when canceling a PO at the header. • Added a condition to check whether a buyer is active or not. If buyer is inactive then an error message will display.

	• Changed to allow the user to reduce the quantity on a new distribution line for a rolled PO. • Updated the online purchase order to display the correct adjustment and sales tax amount when distribution is split using speedchart.
PO Inquiry	• Corrected the requisition detail hyperlink on the Purchase Order Schedule page (PO inquiry) to display the correct page. • Modified to populate and display the item description on the PO Inquiry Distribution page.
PO Rollover	• Ensured that the current period lines are not closed incorrectly during the PO rollover process. • Updated the PO Rollover Report to display the correct values in the report total column. • Modified to prevent a new line from having a double accounting entry after budget checking when an old period PO that has a change order and a line in the new period is rolled into a new period.
Procurement Card	Delivered a script to sync up the last auto numbers so a corporate credit card can be added to the user profile.
Receipt Accrual	Changed to allow the user to reduce the quantity on a new distribution line for a rolled PO.
Reconciliation Workbench	• Corrected to prevent the reconciliation program from closing ineligible POs. • Ensured that forcing close purchase order through the reconciliation workbench will close the purchase order for a partially matched PO.
Vendor Rebate	Resolved problem where a vendor rebate is created under a setid that is different than the setid associated with the selected vendor.
Requisitions	• Ensured that when requisition lines are selected or deselected on the Requisition Selection page, only the correct lines are selected for staging. • Modified to allow access to the Pegging Inquiry for non-soft reserve items such as maintenance work order items. • Resolved problem when using the multispeedchart functionality on a requisitions so that when distributing by quantity, the amount to distribute field is hidden on all lines. When distributing by amount, the quantity to distribute field is hidden on all lines. • Ensured that the requisition line level sourcing functions correctly for ePro requisitions. • Ensured that for multiple distribution lines on a requisition, the change in line defaults will affect all the distribution lines. • Corrected data conflict error when changing ship to locations for more than one requisition line. • Modified to issue a warning message when the GL business unit is

	blank and the budget ChartFields are defined. • Modified to display all lines when requisitions with more than two lines are saved from the Schedule page when commitment control is enabled. • Updated the online Requisition process so that a default buyer value on the Default page is not removed when the default vendor location is changed. • Modified online Requisitions to not display the delete requisition button when deletion is not allowed. • Modified online Requisitions to prevent the user from being prompted to redistribute changed quantities when there is only one active distribution row. • Updated online Requisitions to update the price when the unit of measure is changed.
Reports	• Removed unwanted field labels from the Receiver Delivery report. • Resolved error that prevented launching the Print Delivery Report. • Ensured that the Planned Receipt with Print Schedules displays the correct open quantity. • Ensured that Requisition Print Report displays requisition header, line and ship to comments irrespective of whether or not the Send to Vendor box is selected. • Ensured that the PO Dispatch process creates LIS and CTL files when the fax option is selected.
PO Dispatch	• Modified to display the entire credit card expiration date on the PO Dispatch report.

PeopleSoft Enterprise Services Procurement

This table summarizes application updates for PeopleSoft Enterprise Services Procurement since the SCM 8.9 Bundle 5.

Functional Categories	Description
Work Order	• Corrected the rate used for a purchase order price calculation when the PO originates from a Services Procurement work order or requisition. • Modified the work order component to use the correct default values for Service Coordinator / SC team when VMS is enabled.
Time and Expense	Modified the Project Costing Export program to use the correct GL business unit and create the correct project costing entries.

PeopleSoft Enterprise Strategic Sourcing

This table summarizes application updates for PeopleSoft Enterprise Strategic Sourcing since the SCM 8.9 Bundle 4.

Functional Categories	Description
Interface	Altered PeopleCode to prevent duplicate bid factor codes for a given line.
Reporting	• Formatted dates on the Cycle Time Analysis report so that they are platform independent. • Modified the Event Invite Notification PDF (aucpdf.sqr) to properly select correct terms and conditions based on user's setid.
Translations	Modified page label layout to allow proper grammar when label is translated into different languages.
Integration - Contracts	Altered code so that if an agreement already exists at the line, header, or event level then just a corresponding clause is added to the contract agreement.
Sourcing Plans	• Modified PeopleCode to allow duration days to be copied over to the template correctly when saved from a Sourcing Plan. • Modified PeopleCode to allow task details and instructions to be properly copied over when a new template is created.
Event Creation	• Modified search record to include the template flag as an alternate search key and set to "N" unless being called from a component interface. • Modified code to not allow a collaboration due date to be entered when a template is being filled out. • Modified code for the re-notify checkbox on the Invite Bidder page to be hidden when creating a new version for an event. It will only be visible until the version has been posted.
Award Analysis	• Modified code to pull back proper values for the Optimization Compare. • Modified code to ensure that a warning message appears to the user when any mandatory constraints are violated that.
Usability	Modified PeopleCode to prevent suppliers from gaining visibility into other supplier's information and bids.